

EBU

OPERATING EUROVISION AND EURORADIO

AUDIENCE TRENDS **TELEVISION 2015**

MEDIA INTELLIGENCE SERVICE
OCTOBER 2015

METHODOLOGY

- Data for this report are provided by Eurodata TV Worldwide/Relevant partners and EBU Members through the Media Intelligence Survey and the GEAR network.
- Year on year evolutions are only based on countries with comparable figures. All those with methodological differences have been excluded.
- Youth age group refers to 15-24 year olds, though some market definitions vary.

AUDIENCE DATA DEFINITIONS

Daily Viewing Time (HH:MM)

The average number of minutes of TV that each individual watched per day



Weekly Reach (000s / %)

Everyone that watched for at least 15 consecutive minutes in an average week, though in some markets definitions vary. Expressed as the total amount of people or as a % of the population



Market Share (%)

% of viewing based on the total TV-watching audience



AGGREGATED DATA

Daily viewing times across markets are averaged to give the average daily viewing time

Reach in 000s across markets are added together to give the total reach in 000s

Reach % across markets are averaged to give the average reach in %

Market shares across markets are averaged to give the average market share

CONTENT

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SECTION 2 **REACH**

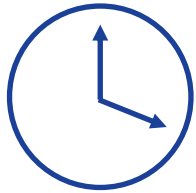
SECTION 3 **MARKET SHARE**

SECTION 1

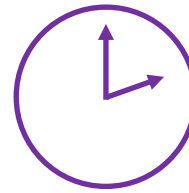
VIEWING TIME



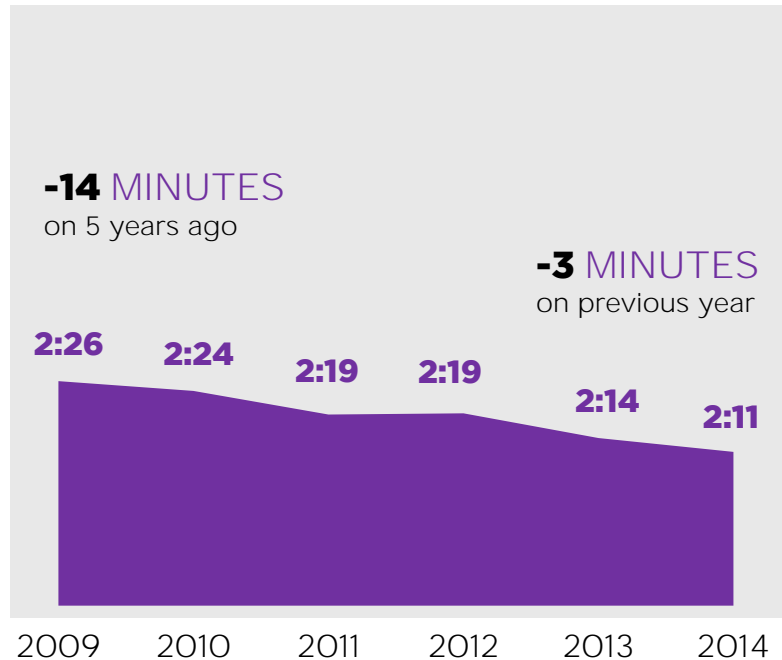
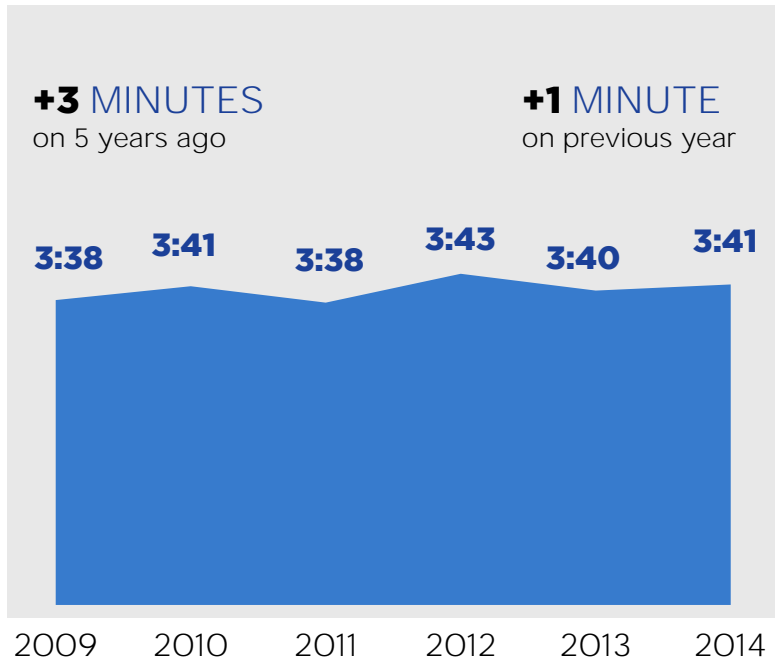
TELEVISION VIEWING TIME IN 2014



EUROPEAN CITIZENS
in 2014 watched on average
3:41 OF TV DAILY



EUROPEAN YOUTH
in 2014 watched on average
2:11 OF TV DAILY



Stable viewing time overall, however declines among youth persist in the majority of markets

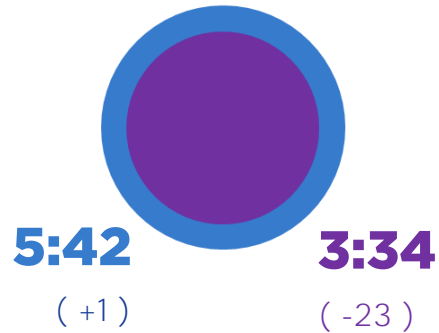
● All ● Youth

2014 daily viewing time (in H:MM)

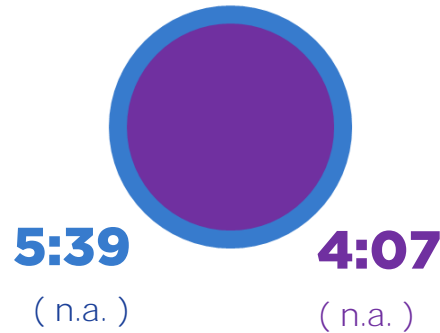
() Difference on previous year (in minutes)

HEAVY TELEVISION VIEWERS

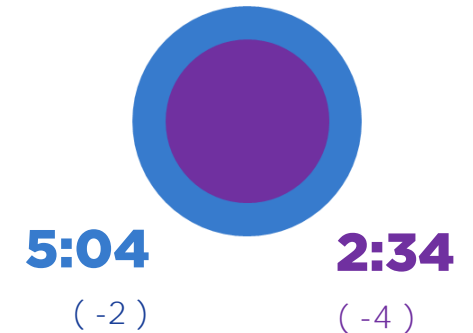
ROMANIA



BOSNIA & HERZEGOVINA

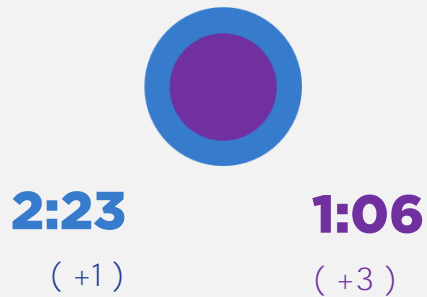


SERBIA

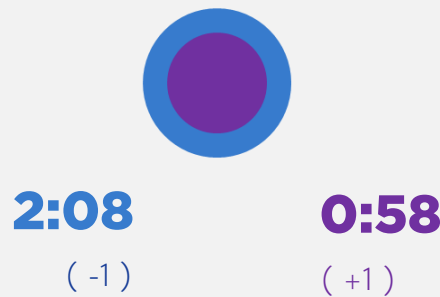


LIGHT TELEVISION VIEWERS

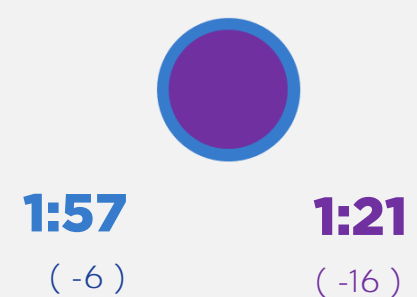
SWITZERLAND FRENCH



SWITZERLAND GERMAN

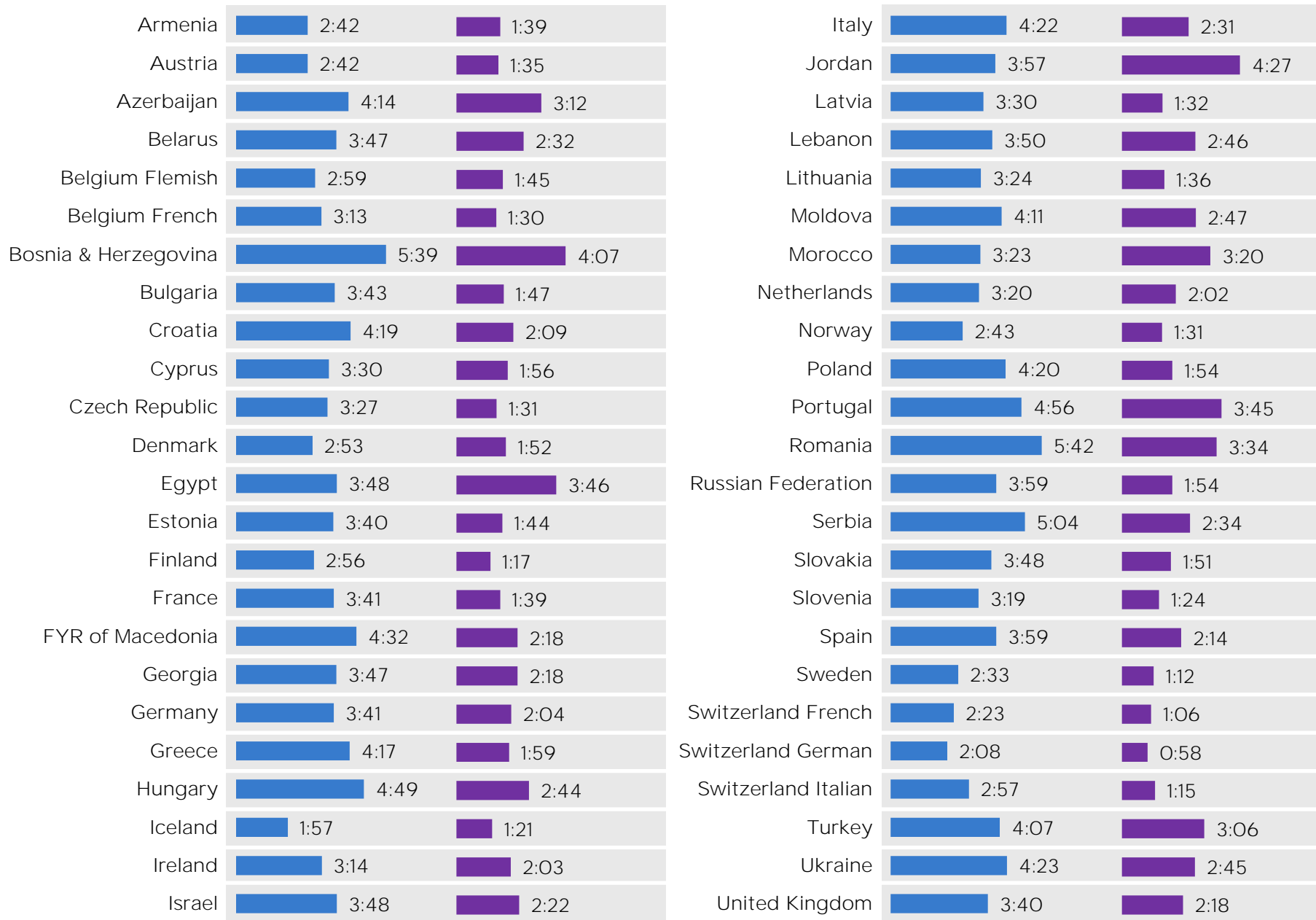


ICELAND



2014 TELEVISION VIEWING TIME

■ All ■ Youth
(in H:MM)



VIEWING TIME

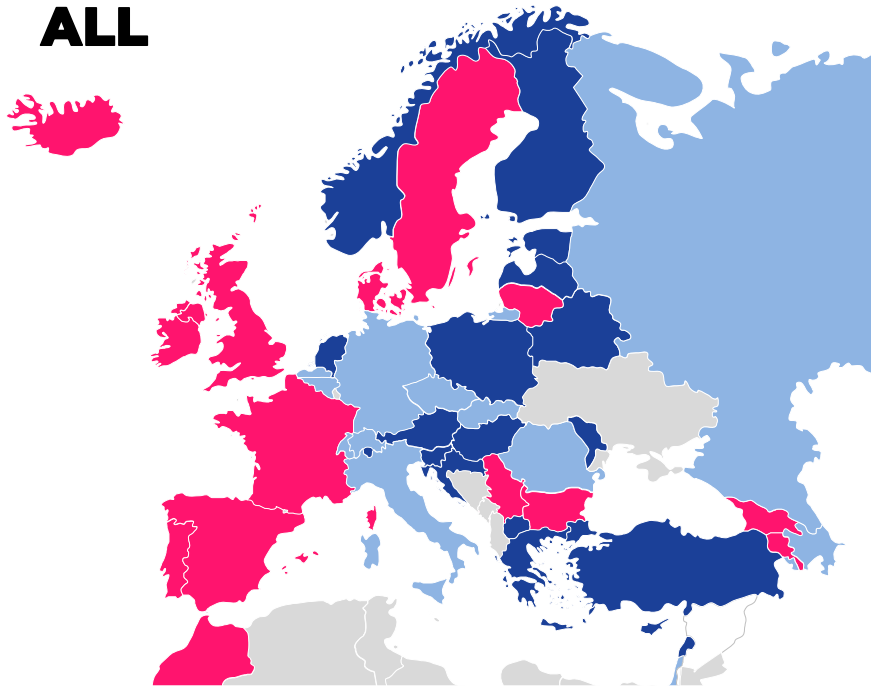
REACH

MARKET SHARE

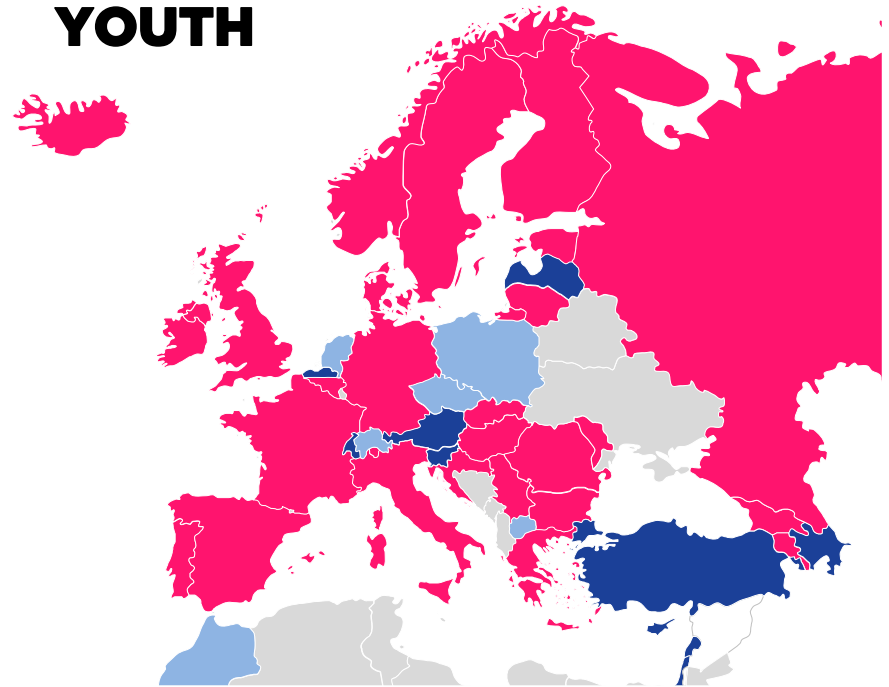
2014 TELEVISION VIEWING TIME

- Increase vs 2013
- Level with 2013*
- Decrease vs 2013
- No evolution data

ALL



YOUTH



41% of markets saw an **INCREASE** in viewing time in 2014

64% of markets saw a **DECREASE** in viewing time among youth in 2014

Difference on previous year (in minutes)

Poland	13	-11	Georgia
Latvia	11	-12	United Kingdom
Switzerland Italian	11	-16	Lithuania

Cyprus	31	-23	Romania
Israel	16	-28	Armenia
Belgium Flemish	12	-45	Belarus

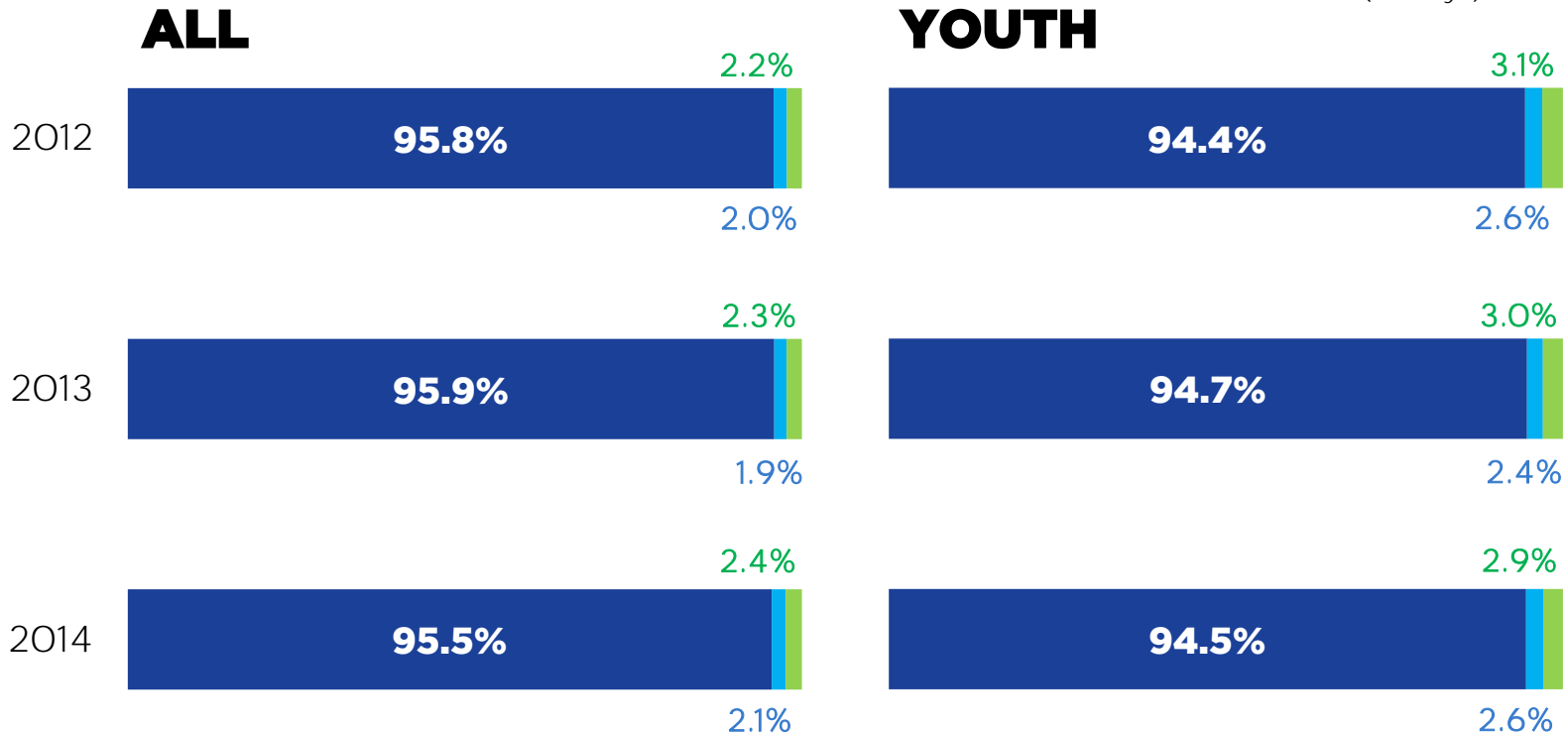
VIEWING TIME

REACH

MARKET SHARE

TELEVISION TIME-SHIFTED VIEWING

- Live
- Same day time-shifted (VOSDAL)
- Time-shifted (+7 days)



LIVE VIEWING

-0.3 POINTS

on 2 years ago

LIVE VIEWING

+0.1 POINT

on 2 years ago

Live viewing remained strong with the proportion of time-shifted viewing stable for the third consecutive year

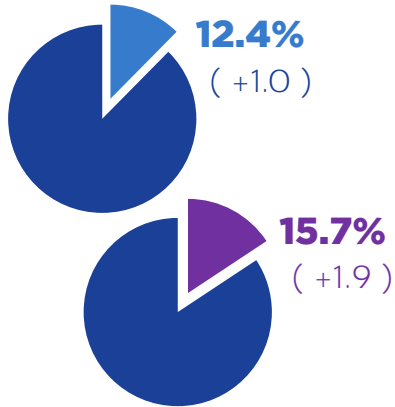
HEAVY TELEVISION TIME-SHIFTED VIEWING

● All ● Youth

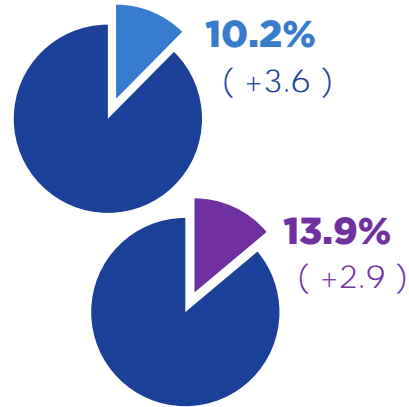
2014 time-shifted viewing (in %)

() Difference on previous year (in points)

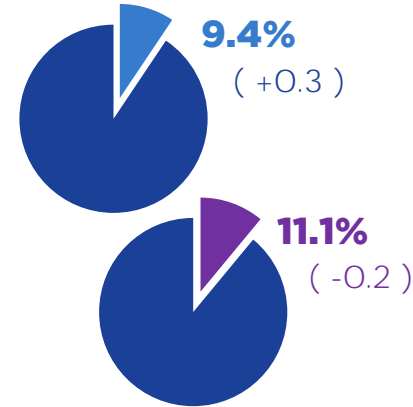
UNITED KINGDOM



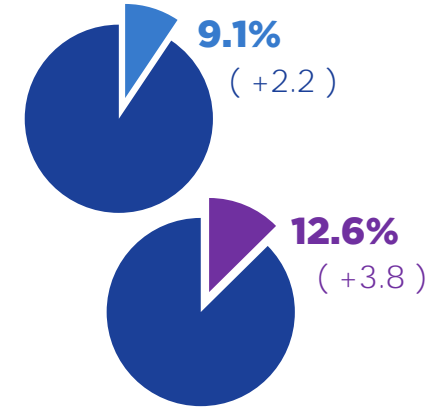
ICELAND



IRELAND

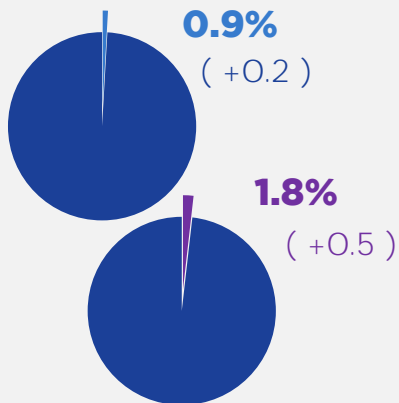


SWITZERLAND FRENCH

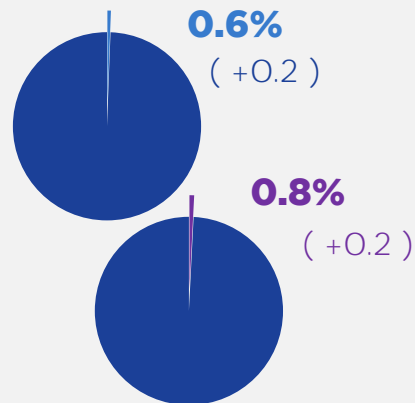


LIGHT TELEVISION TIME-SHIFTED VIEWING

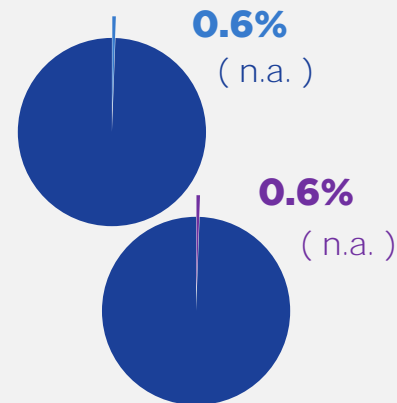
ITALY



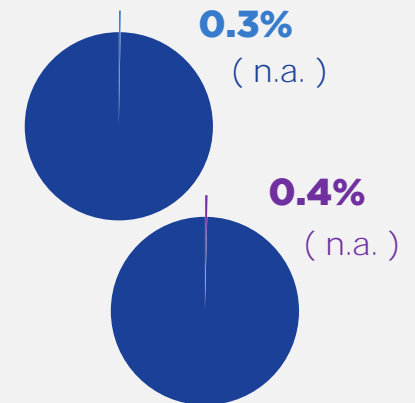
ROMANIA



POLAND



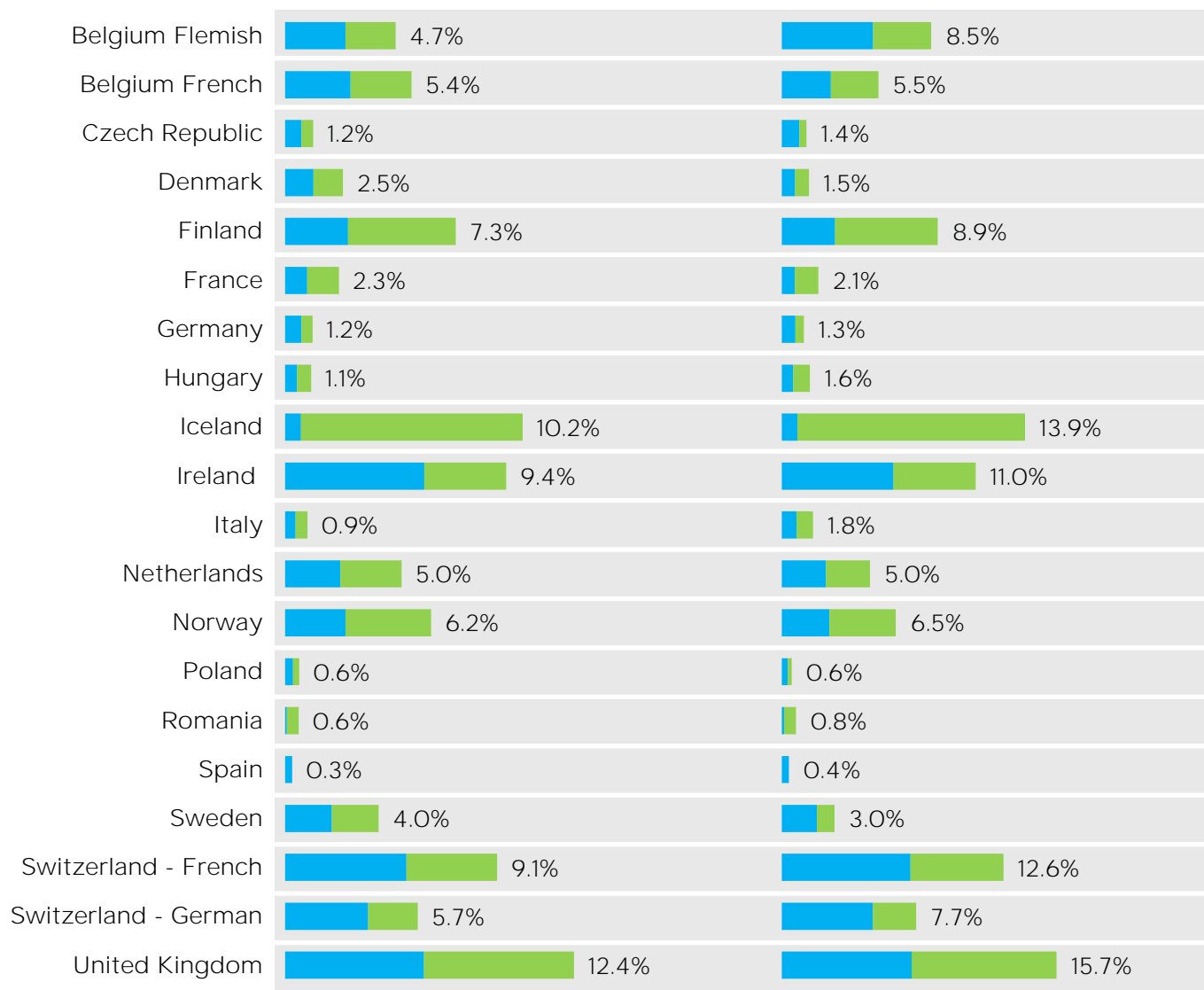
SPAIN



2014 TELEVISION TIME-SHIFTED VIEWING

ALL

YOUTH



■ Same day time-shifted (VOSDAL)
 ■ Time-shifted (+7 days)

Only 26 EBU Area markets measure time-shifted viewing.

In the majority of these markets time-shifted viewing is measured up to 7 days after live.

With the exception of:

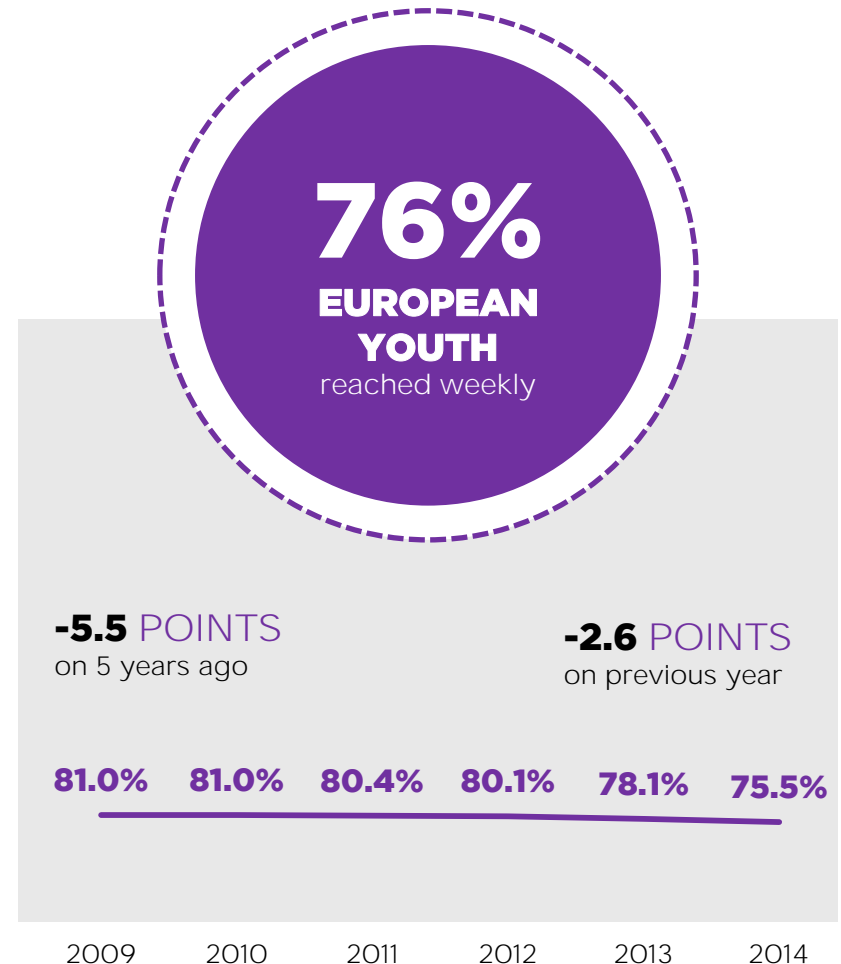
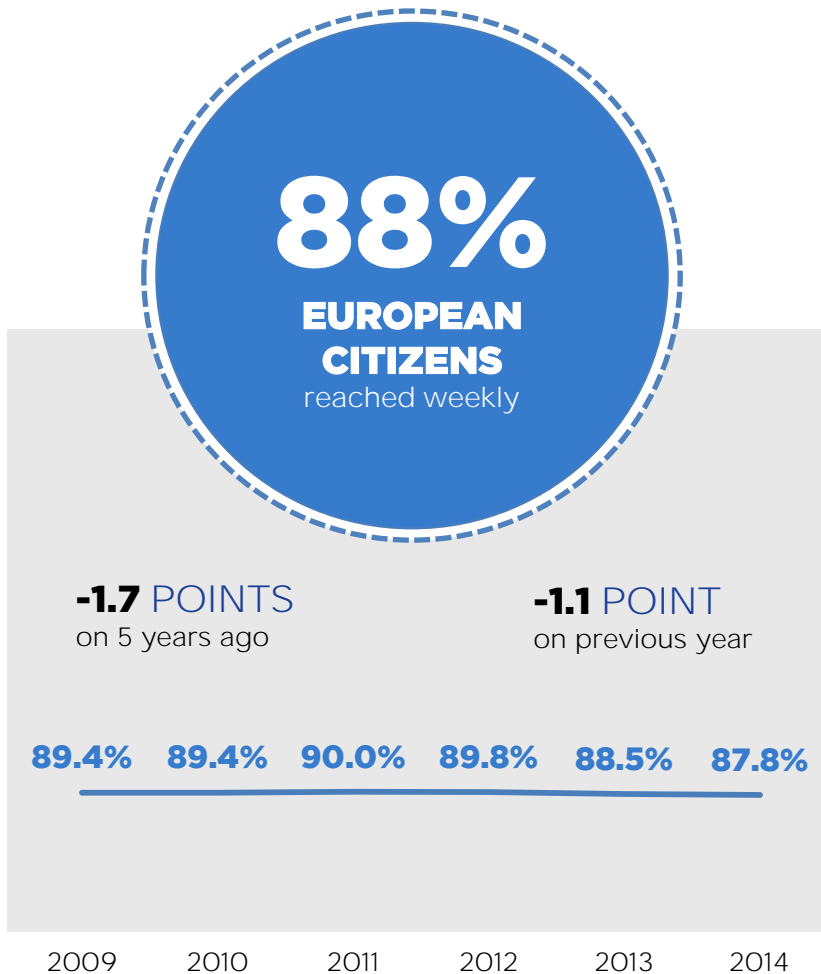
- Netherlands and Belgium measured up to 6 days after live
- Germany measured up to 3 days after live
- Spain measure only same day time-shifted viewing.

SECTION 2

REACH



TELEVISION WEEKLY REACH IN 2014



A third consecutive year of minor decline in 2014 with a more marked decline among youth

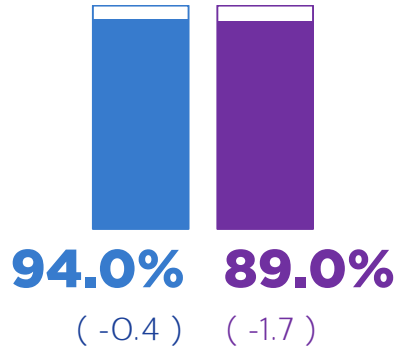
HIGH TELEVISION WEEKLY REACH

■ All ■ Youth

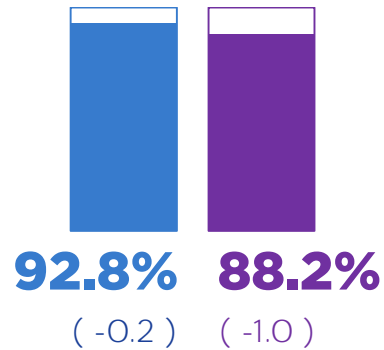
2014 weekly reach (in %)

() Difference on previous year (in points)

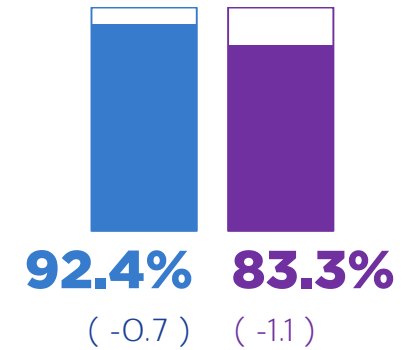
NETHERLANDS



SPAIN

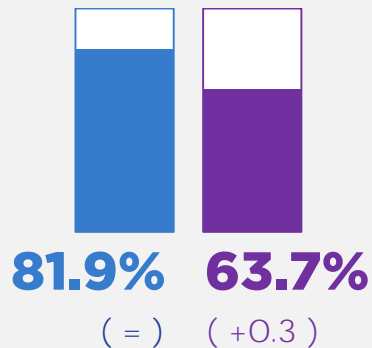


UNITED KINGDOM

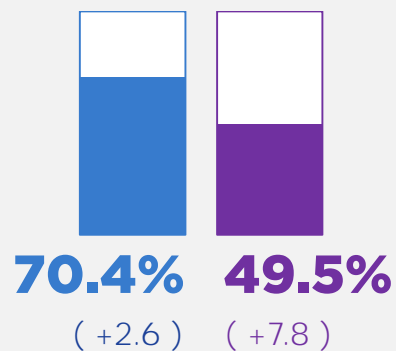


LOW TELEVISION WEEKLY REACH

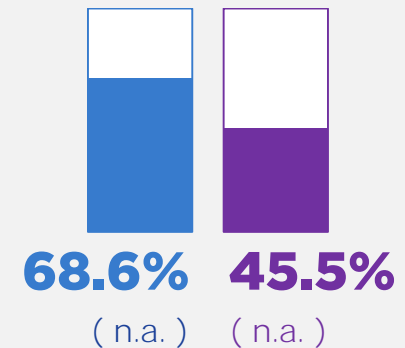
SWITZERLAND



CYPRUS

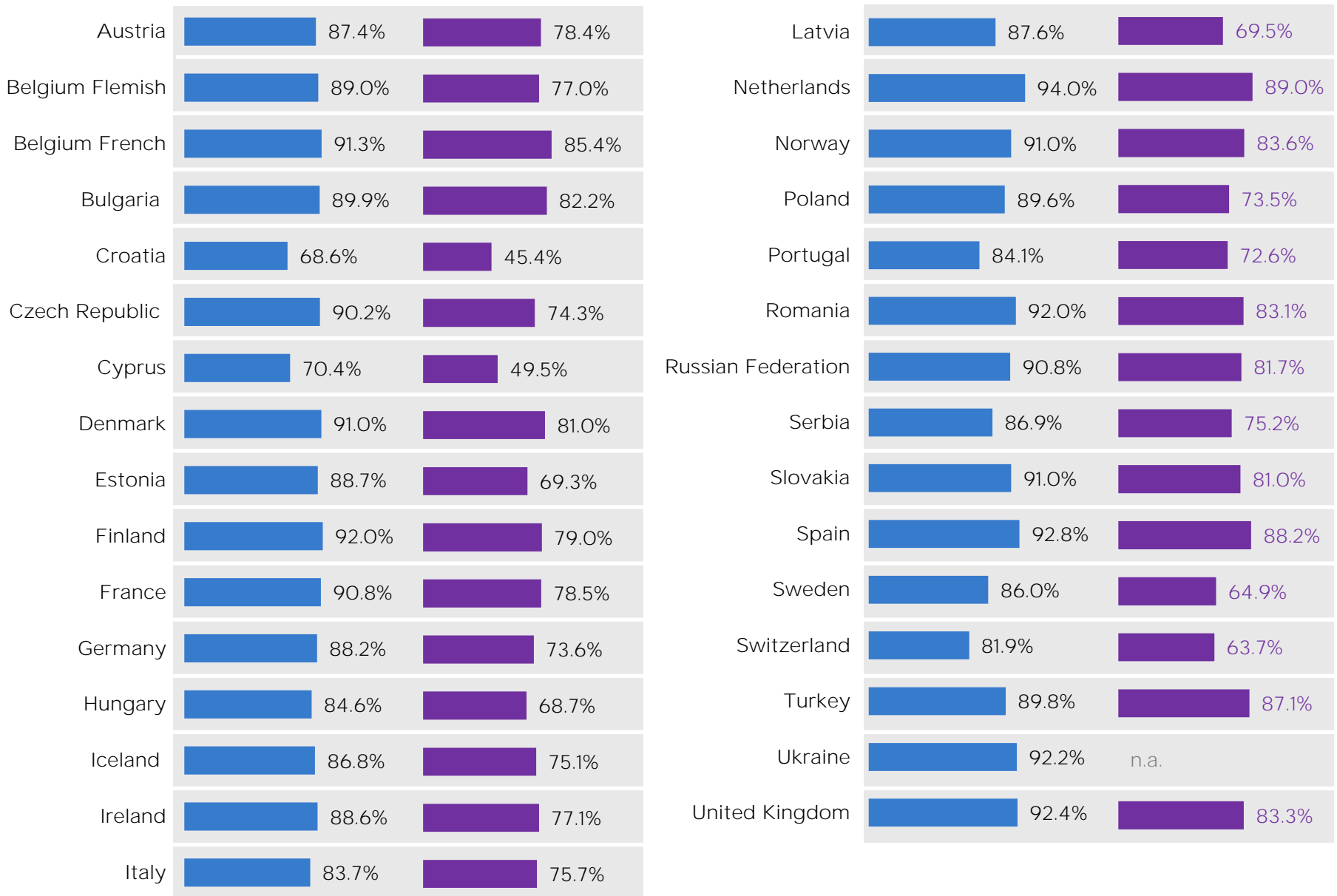


CROATIA



2014 TELEVISION WEEKLY REACH

■ All ■ Youth
(in %)



VIEWING TIME

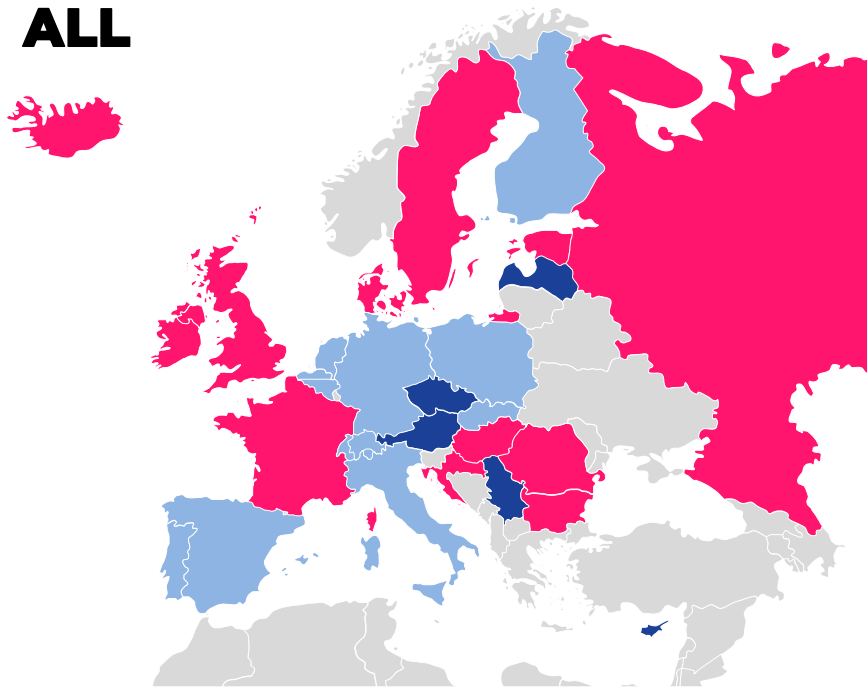
REACH

MARKET SHARE

2014 TELEVISION WEEKLY REACH

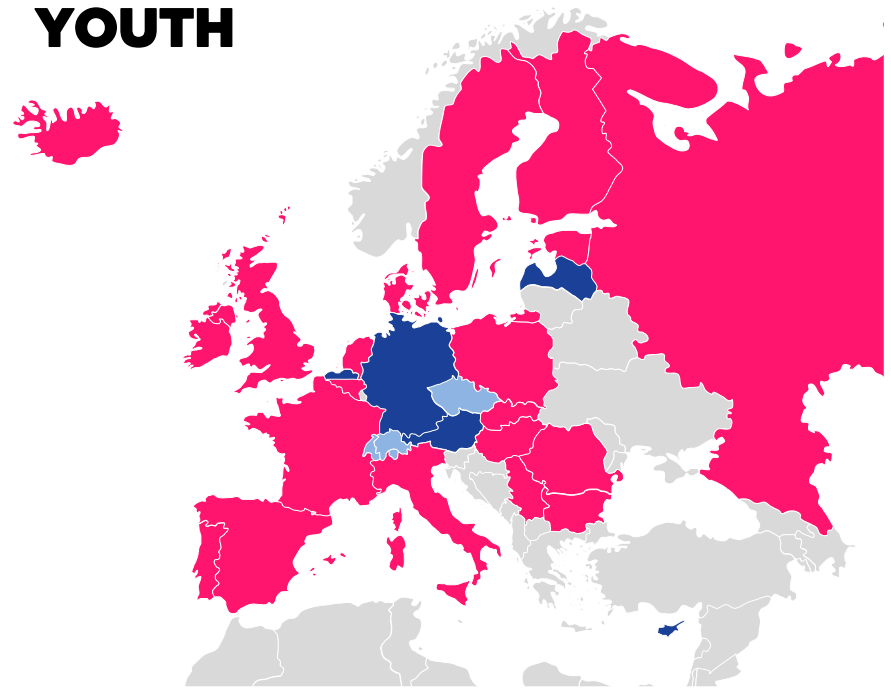
- Increase vs 2013
- Level with 2013*
- Decrease vs 2013
- No evolution data

ALL



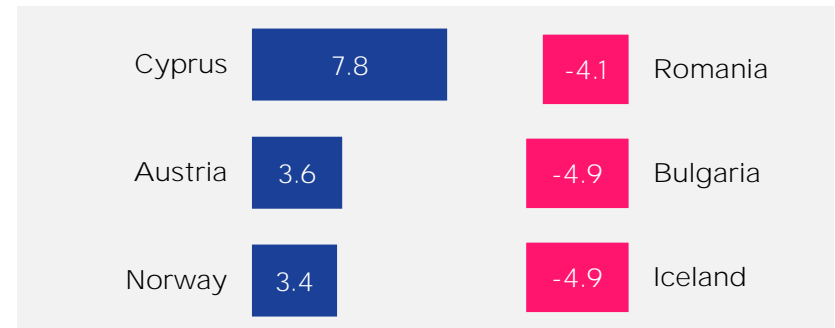
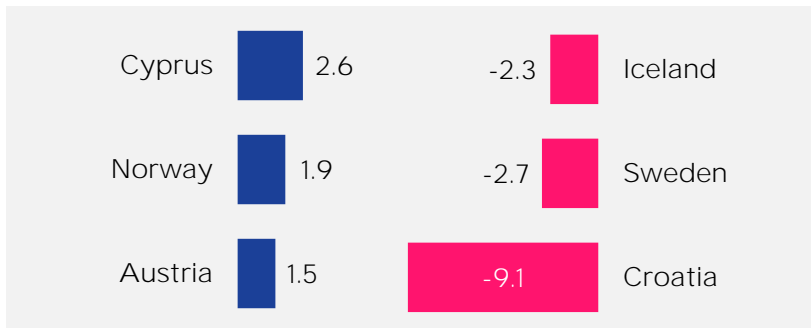
41% of markets saw a **DECREASE** in television weekly reach in 2014

YOUTH



74% of markets saw a **DECREASE** in television weekly reach among youth in 2014

Difference on previous year (in points)

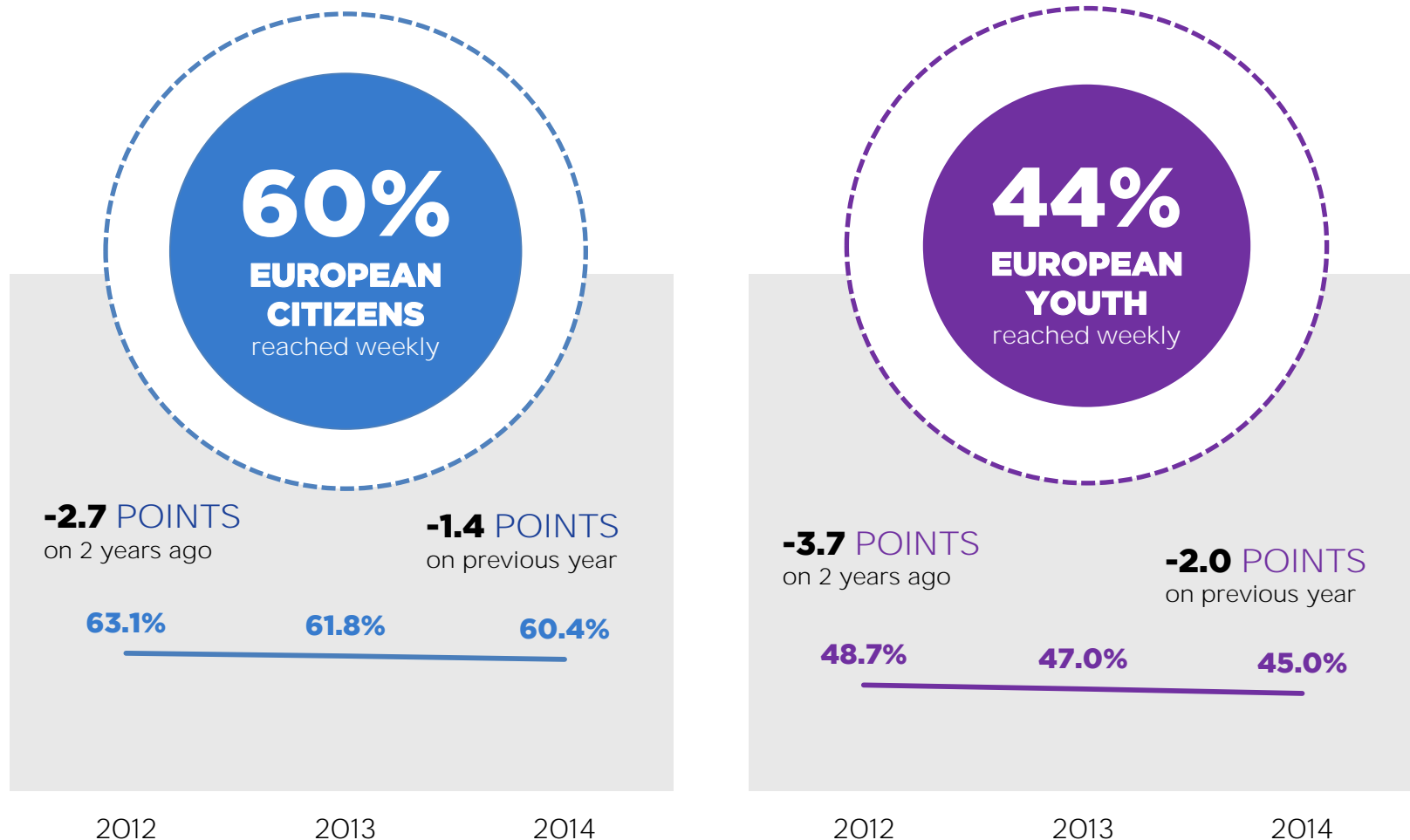


VIEWING TIME

REACH

MARKET SHARE

PSM TELEVISION WEEKLY REACH IN 2014



A third consecutive year of minor decline in 2014. Youth decline in PSM weekly reach is less marked than for all television weekly reach.

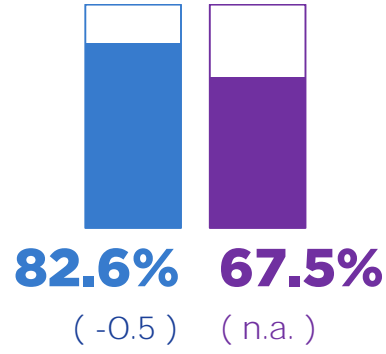
■ All ■ Youth

2014 weekly reach (in %)

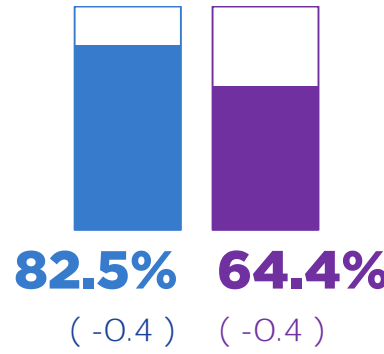
() Difference on previous year (in points)

HIGH PSM TELEVISION WEEKLY REACH

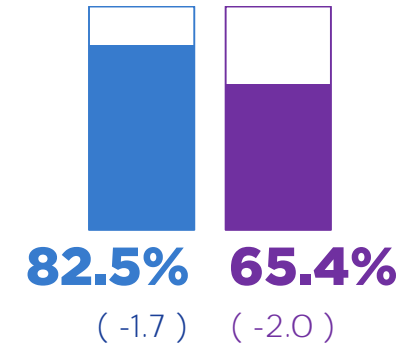
BELGIUM FLEMISH



NETHERLANDS

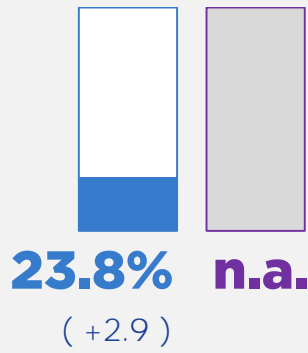


UNITED KINGDOM

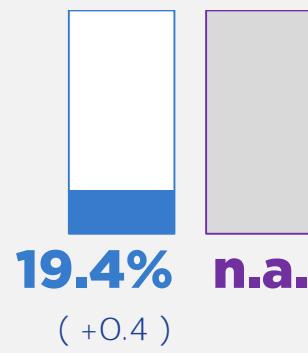


LOW PSM TELEVISION WEEKLY REACH

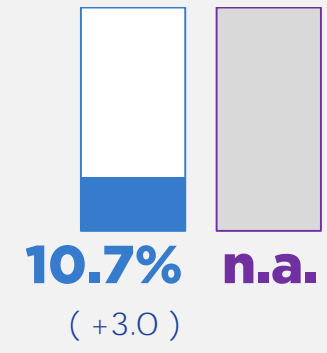
ISRAEL



UKRAINE

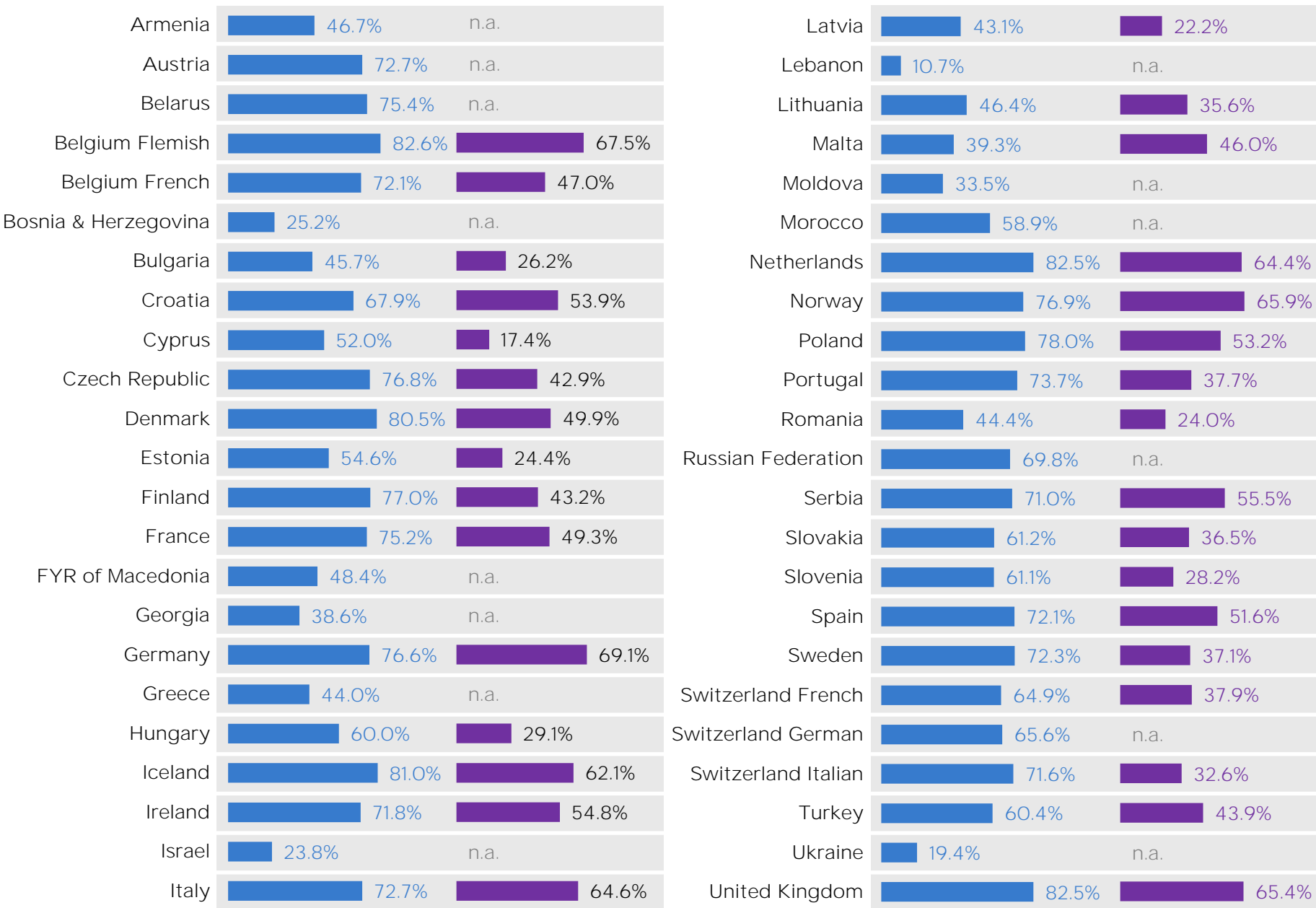


LEBANON



2014 PSM TELEVISION WEEKLY REACH

■ All ■ Youth
(in %)



VIEWING TIME

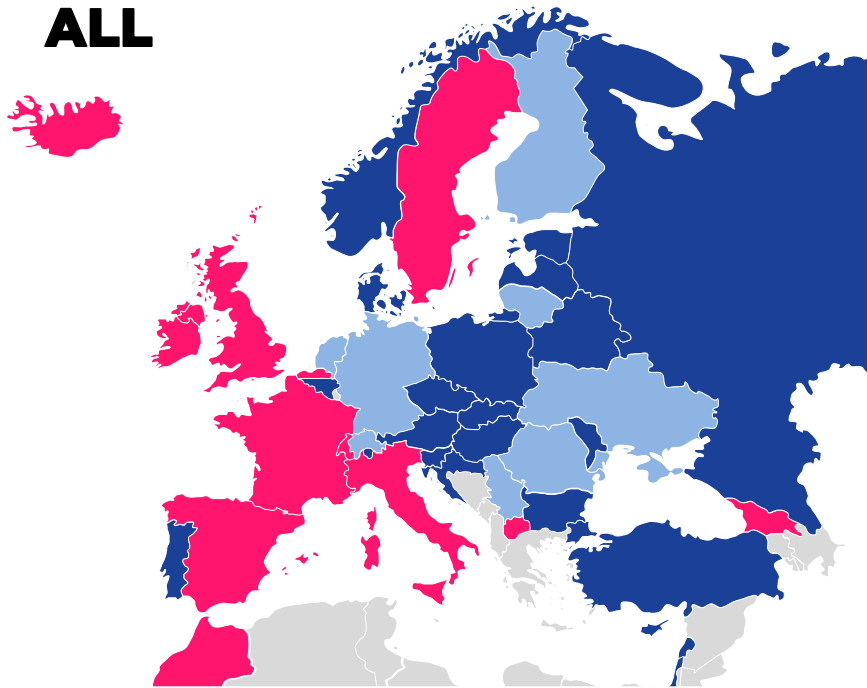
REACH

MARKET SHARE

2014 TELEVISION WEEKLY REACH

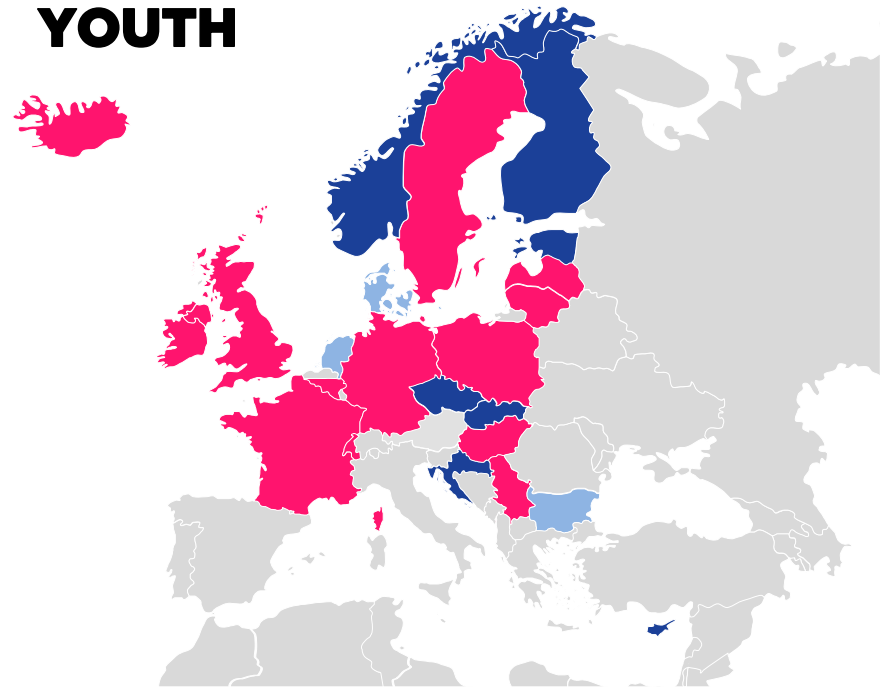
- Increase vs 2013
- Level with 2013*
- Decrease vs 2013
- No evolution data

ALL



52% of markets saw an **INCREASE** in PSM television weekly reach in 2014

YOUTH



57% of markets saw a **DECREASE** in PSM television weekly reach among youth in 2014

VIEWING TIME

REACH

MARKET SHARE

Difference on previous year (in points)

Switzerland Italian	3.8	-3.5	Morocco
Lebanon	3.0	-4.3	FYR of Macedonia
Moldova	3.0	-6.3	Georgia

Estonia	7.8	-5.1	Iceland
Norway	6.9	-5.5	Switzerland French
Croatia	5.9	-6.6	Belgium French

SECTION 3

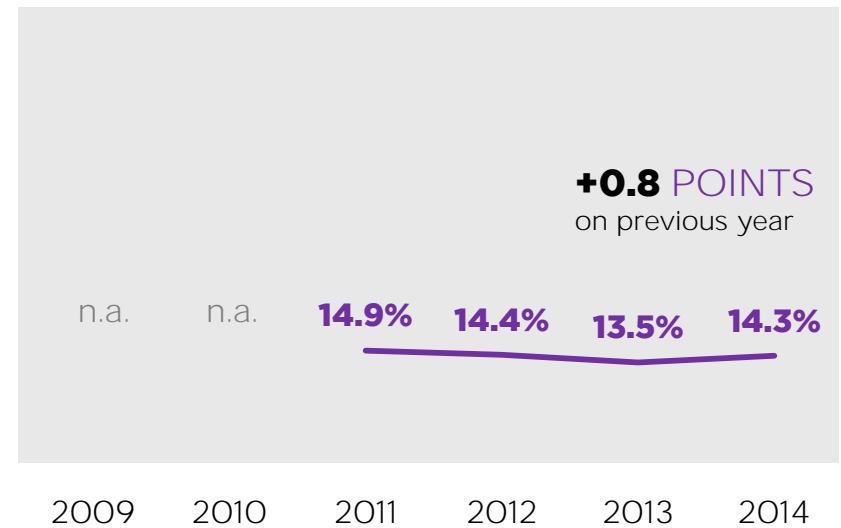
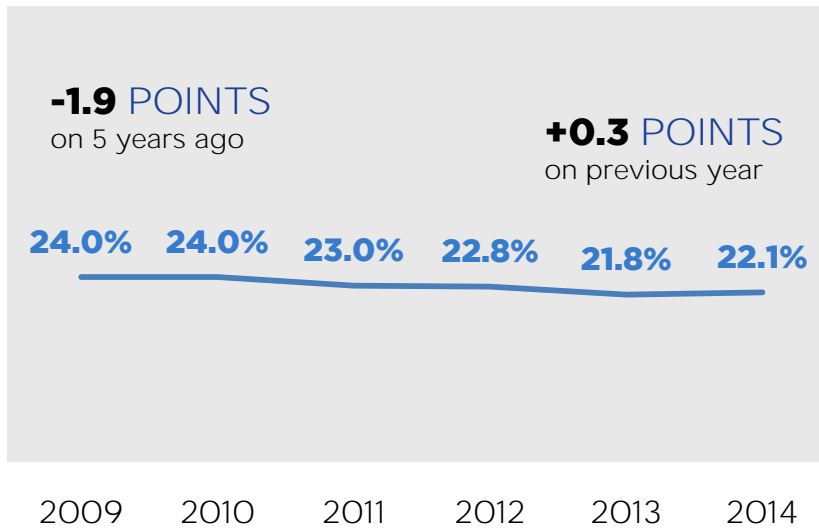
MARKET SHARE

EBU

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PSM TELEVISION MARKET SHARE IN 2014



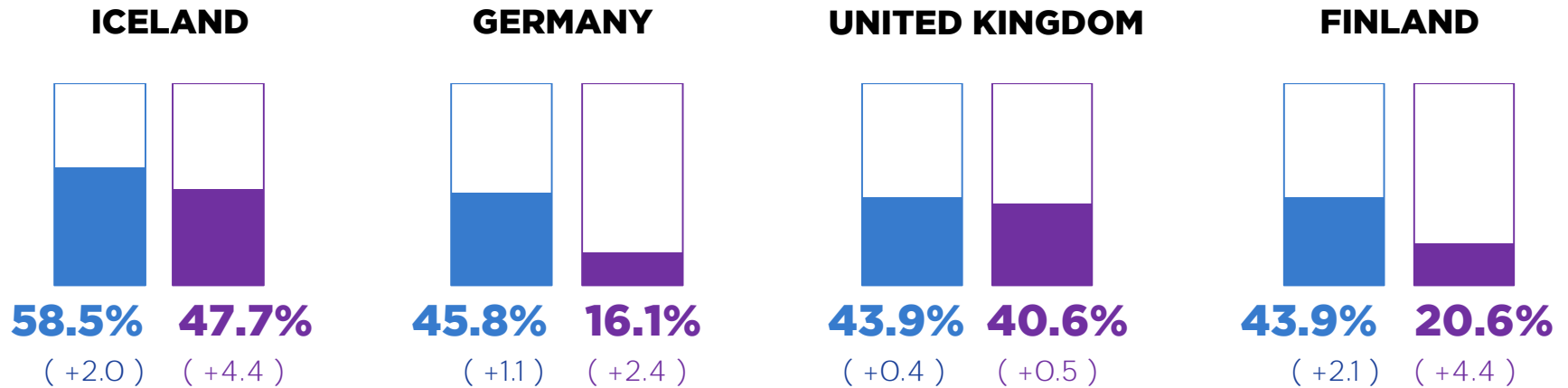
Market shares for all and youth saw small increases in 2014. It was a strong year for PSM with viewing boosted by big sports events (FIFA World Cup and Sochi Winter Olympics)

■ All ■ Youth

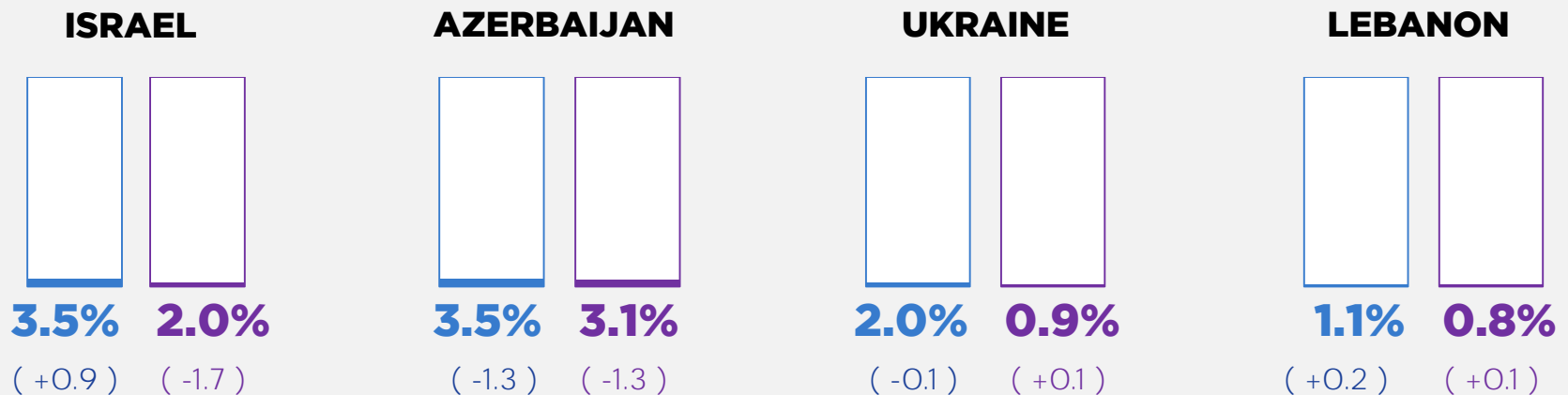
2014 market share (in %)

() Difference on previous year (in points)

HIGH PSM TELEVISION MARKET SHARE

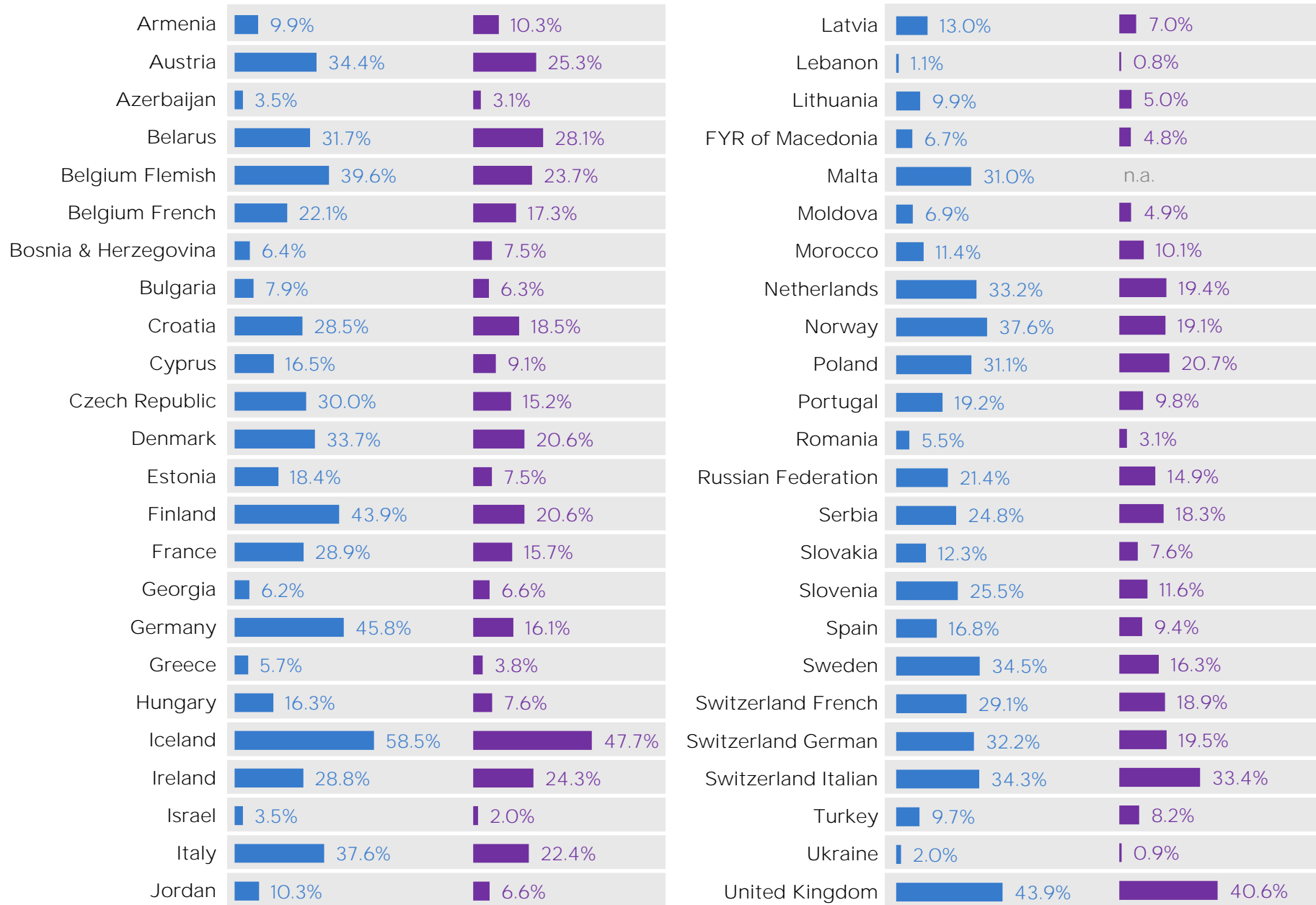


LOW PSM TELEVISION MARKET SHARE



2014 PSM TELEVISION MARKET SHARE

■ All ■ Youth
(in %)



VIEWING TIME

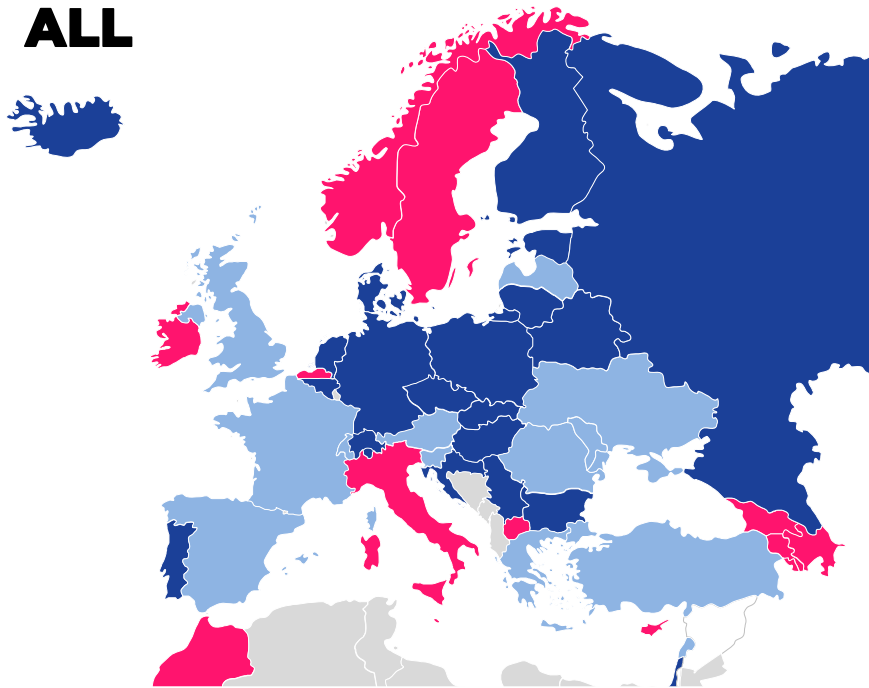
REACH

MARKET SHARE

2014 PSM TELEVISION MARKET SHARE

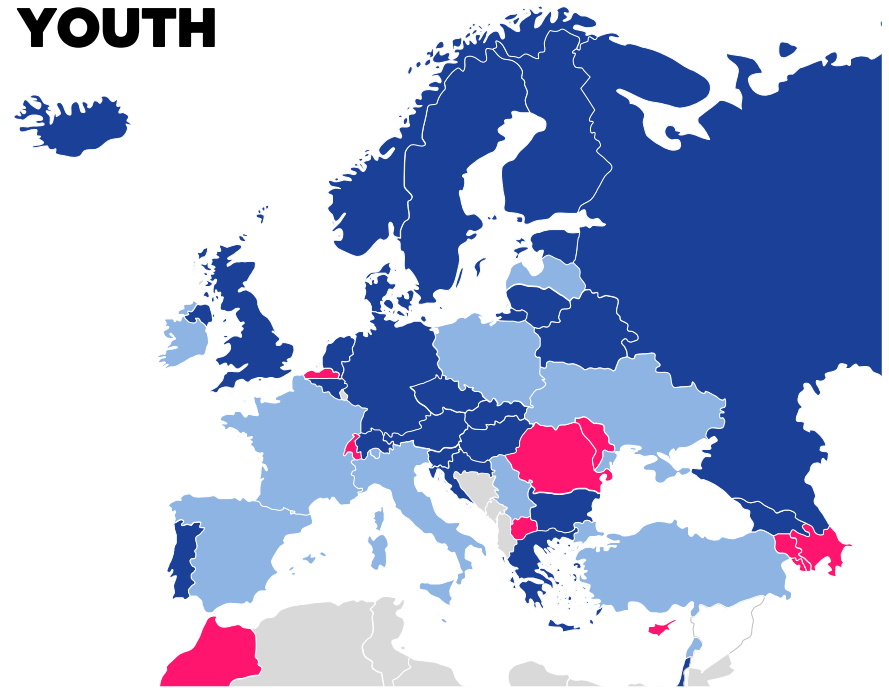
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- No evolution data

ALL



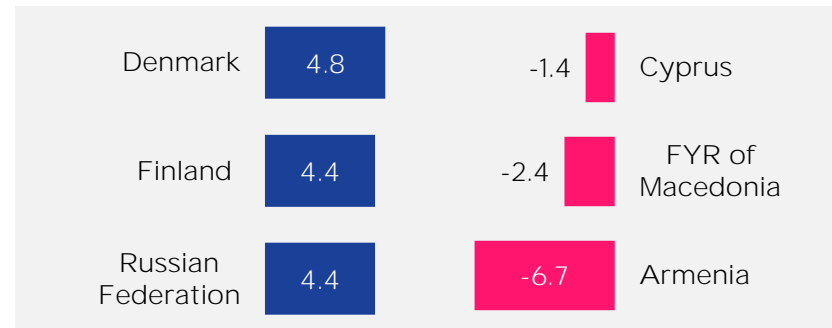
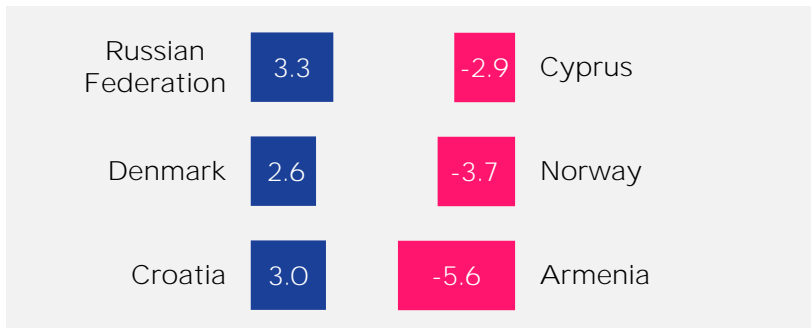
46% of markets saw an **INCREASE** of PSM television market share in 2014

YOUTH



54% of markets saw an **INCREASE** of PSM television market share among youth in 2014

Difference on previous year (in points)



VIEWING TIME

REACH

MARKET SHARE

2014 KEY TELEVISION AUDIENCE TRENDS

- Daily viewing time in the EBU Area remained stable in 2014
Increased by 1 minute from 2013 to 3 hours 41 minutes of TV daily
- Among youth, daily viewing time declined in the majority of markets
Decreased by 3 minutes from 2013 to 2 hours 11 minutes of TV daily
- Live viewing remained strong, accounting for 96% of all television viewing and 95% among youth
Time-shifted viewing has remained at 4% of all television viewing for the past 3 years
Among youth time-shifted viewing has also been stable at 5% over the 3 year period
- 88% of European citizens watch television every week and 60% are reached weekly by PSM television
Small declines in reach over past 3 years with a slightly more notable decline for PSM television
- 76% of European youth watch television every week and 44% are reached weekly by PSM television
Among youth the decline for television reach overall is more notable than the decline for PSM television
- In 2014 PSM television achieved an average 22.1% market share among European citizens
- In 2014 PSM television achieved an average 14.3% market share among European youth
Market shares for all and youth saw small increases in 2014. It was a strong year for PSM with viewing boosted by big sports events (FIFA World Cup and Sochi Winter Olympics)

MEDIA INTELLIGENCE SERVICE

This report was produced by the Media Intelligence Service (MIS) at the European Broadcasting Union.

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